



How Our Law Firm Is Different

The “Traditional” Lawyer Experience

In order to show you how our law firm is different, it’s necessary to describe the “traditional” lawyer experience. If you have ever worked with a lawyer, the following scenario will be all too familiar.

You find yourself in need of a will or other estate planning document, and you make an appointment with a lawyer to handle it for you. While discussing his idea of the documents you need, he has a way of making things seem very complicated and confusing. You get the sense that this lawyer is smart and must know what he is doing, so you will nod your head and answer questions as if you understand everything. Because you want to do the right thing for your family, you have the lawyer prepare the legal mumbo-jumbo documents that you then sign. You take the signed documents back home, stick them in a file (fireproof!), and happily mark the task off your checklist as “DONE,” secure in the knowledge that you have taken good care of your family and assets.

As the years pass, change happens: you add a new baby, the oldest graduates from college (thank God), you inherit a little money from weird Uncle Frank, you finally retire and buy that dream vacation cottage by the beach. Or you hear about a change in the tax law, but you figure that your lawyer surely would have contacted you if it affected you, so you do not worry about it. Come to think of it, you have not heard from him since you got his last bill and have little idea how to contact him anyway.

Then the inevitable happens and you pass on, perhaps suddenly, perhaps after a long, costly illness. Unfortunately, because your estate planning documents were not customized and updated to keep up with you and your changes, your family is probably left unprotected—or worse—as assets will not go to the people you intended.

This firm is dedicated to AVOIDING THE OBSTACLES OF THE TRADITIONAL EXPERIENCE. We have based our philosophy on our founder’s 30 years of caring for families, properly planning their estates, and building a lifelong relationship. The plans that many law firms offer are not designed to serve a growing family that is accumulating wealth and the many changes that happen on their way to success. **Our plans are.**

OUR FIRM HELPS YOU PREPARE FOR SUCCESS

What makes our firm different is that we were built with the needs of growing families and individuals in mind. We understand you are BUSY, you are growing, you are planning for prosperity and you value ease, convenience and efficiency. You want to know you have made the best



decisions for your family and that your plan will work to keep things operating smoothly when you pass on.

That is our focus as well. Our firm was created by a lawyer who has met with hundreds of families, and is a father and grandfather himself. So we have developed unique systems to give you affordable access to an experienced legal team that approaches your estate planning based on sound principles. With our guidance and long-term commitment, you can build a safe and secure future while you accumulate wealth.

We bill like a business, not a law firm. In fact, we have thrown out the “traditional” law firm time clocks so you don’t have clutch your wallet to your chest if you call with a quick question (or even a not so quick question). Everything we do is billed on a *flat-fee basis, agreed to in advance*, so there are never any surprises.

We have created unique membership programs that emphasize long-term relationships, not transactional contact. These keep your planning up to date at all times and give you access to our team of legal experts for guidance *at any time on any* legal or financial matter. It is all included in the membership you chose. And, on the day you need a lawyer for things other than normal business, we will be here to advise you or get you out of a jam.

Is our unique service expensive? Not really. Paying us now for good planning and continued maintenance is *substantially less costly* than paying us later to extricate you from a preventable crisis. Out of all of our clients who believe in our unique approach to planning and relationship and who want to put it place, not one has left our offices because they could not afford it. We’ve made creative financing available to our clients because we know that this planning is the foundation for a successful business!

We follow through to make sure all parts of your plan fit efficiently together.

We encourage communication with our clients and strive to answer your questions the very same day. When you call our office you will not have to wait until tomorrow or next week for a return call from an attorney. In fact, you will find that many questions can be answered immediately by one of our trained paraprofessionals. However, if you need a more in-depth discussion with your lawyer, we employ a system to ensure that you speak with him or her that very same day. We teach our lawyers to concentrate on your matter while working on it so we normally cannot answer the phone for unscheduled calls. Thus, virtually all calls to an attorney are *scheduled* for a return call at a specific time when both you and the attorney are available and prepared to talk. This altogether avoids the aggravation of voicemail after voicemail, message after message, back and forth, *wasting your time*. Instead, we are able to offer our exclusive attention to you and your matter without any distractions and with all the necessary information in hand to answer all of your questions, *maximizing your value*.



HOW TO PREPARE FOR YOUR ESTATE PLANNING SESSION

You will get the most out of your personal Estate Planning Session if you are well prepared.

Please complete the Estate Planning Worksheet found in the left hand pocket of this folder. Do not worry if you do not know all the answers--we realize that for many people this is a starting point. The planning process itself is an extremely helpful tool to pinpoint your needs. Please return your worksheet at least *two days prior* to your scheduled meeting to give us the opportunity to thoroughly review your worksheet and be ready to advise you when you come for your meeting.

Please be sure to bring the documents requested below and the worksheet to our scheduled meeting.

- LATEST FEDERAL TAX RETURN
- FINANCIAL STATEMENT, IF AVAILABLE
- BROKERAGE STATEMENT
- BANK STATEMENT
- LLC OR PARTNERSHIP AGREEMENTS
- LIFE INSURANCE POLICY STATEMENT
- BENEFICIARY CHANGE FORMS
- IRA/401 (K) STATEMENT
- PENSION PLAN STATEMENT
- PREVIOUS ESTATE PLAN DOCUMENTS

Now would also be a good time to request beneficiary designation change forms from your insurance company, retirement account custodians, or from your HR department if you have work-related benefits. While you will not need those right away, you will need them eventually.

If you have any trouble gathering any of this information, do not hesitate to give our Client Services Director, Anne Llewellyn, a call at 210-690-3700. Remember, we are here to help.